FREE TAX HELP

AARP Foundation
TAX-AIDE
Free tax assistance for those who need it most

The AARP Tax-Aide program, administered by the AARP Foundation in cooperation with the IRS, provides free income tax assistance to ALL taxpayers, with special attention to those aged 60 or older.

Volunteers will assist in preparing basic federal and Oregon tax forms for personal tax returns. They can assist with most of your everyday tax situations including Affordable Care Act forms, Health Savings Account forms and filing for Earned Income Tax Credit Assistance.

However, volunteers cannot help you if you:

- have a business or hobby with employees, inventory, losses, or expenses over $35,000
- want to file Married Filing Separately*
- have rental income from land with a structure
- donated a motor vehicle, boat or airplane with a value of over $500

There are other complicated tax situations that may be beyond the scope of the AARP volunteers. If so, you may have to seek tax advice from a paid tax professional.

Tax returns are electronically filed as a free service by Tax-Aide.

* Does not apply to Oregon returns (Mid-Columbia Gorge/North Central Oregon area)

Print tax forms 24/7 at www.irs.gov.

NEED SOMETHING PRINTED?
Visit www.fvrl.org, click on 'Contact Us', choose 'Send a Print Request'.

FREE ASSISTANCE is available from February 15 through April 15.

ALL assistance and returns will be prepared by appointment only in a virtual environment in 2021.

There will be no in-person service this year.

CLARK AND SKAMANIA:
Call 360-302-2641 to make your appointment beginning February 1, 2021.

MID-COLUMBIA GORGE/NORTH CENTRAL OREGON:
Email ***gorgetaxaide@gmail.com*** to connect with a Tax Law Certified Volunteer.

You may also request assistance online at ***www.aarpfoundation.org/taxaide***

• Please see the reverse side for "what to provide".

WHAT TO PROVIDE?

Emailed instructions will be provided when the appointment is scheduled.

You MUST email the following:

- Copy of last year's return
- Bank information (check from checkbook, letter from the bank) showing the routing number and account number for automatic deposit of your refund, or withdrawal of your tax bill, if you want the refund or payments to be automatic. A voided check is not required.

IDENTIFICATION

- Government issued photo identification for the taxpayer and spouse
- Social Security identification card. Other documents may be acceptable if issued by a government agency and has the FULL Social Security number (9 digits) printed on the form
  - This is needed for the taxpayer and each person that will be listed on the tax return, e.g., spouse, children, parent or relative that may be listed as a dependent
  - If a Social Security number has not been issued, provide a current and valid letter or card for an ITIN or ATIN.

INCOME: All tax documents or statements that show income received by you and your spouse. Examples are, but are not limited to, the following:

- W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), SSA-1099 (social security income), 1099-R or RRB-1099 (retirement income), 1099-NEC (non-employee compensation) and 1099-MISC (miscellaneous income).
- 1099-B (consolidated brokerage statement) that shows the date and price of acquisition and sale of capital assets such as stocks and bonds.

EXPENSES: All tax documents or itemized statements that show expenses incurred by you and your family. Examples include, but are not limited to, the following:

- Total medical copays, prescriptions, and mileage to and from the medical facilities.
- Total value of donated items with date of donation. Mileage for your charitable organizations..
- 1098 Mortgage Interest Statement showing interest and property taxes paid (if property taxes are not listed, provide the County Tax Assessment bill).
- Bill of sale for vehicles, boats or major home improvements, with the sales tax paid on the receipt.

OTHER (if applicable)

- Education expenses including the 1098-T, the account statement, and expense statement from the college if the student has higher education expenses.
- Health care coverage forms, e.g. 1095-A, 1095-B, 1095-C, or 1099-SA (HSA).
- To claim dependent or child care expenses, provide the caregiver's name, address, payments, and the Employer Identification Number (EIN) or Social Security Number (SSN).